

Progress Report

Started It	Making Progress	Complete!
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1) Welcome

2) Your Vision

• Pillar 1: Client Analysis

3) Client Classification

4) Rightsizing

• Pillar 2: Client Experience

5) Client Profiling

6) Client Service Model

7) Client Events

8) Client Communication

9) Referrals

• Pillar 3: Client Onboarding

10) New Client Process

11) Pre-Appointment Process

12) The 1st Appointment

13) The 2nd Appointment

14) The 3rd Appointment

15) New Client Welcome

• Pillar 4: Client Rebranding

16) Existing Client Process

17) 1st Rebranding Appointment

18) 2nd Rebranding Appointment

19) Review Meetings

20) Strategic Partners

21) Road to Success – Part 1